

Batch and Multi-Case Processing

For Trustees

CM/ECF Batch and Multi-Case processing were developed to expedite the filing of multiple documents. Both processes file the same type of document to different cases in one operation.

The basic difference is that the Batch feature offers the association of a different PDF file for each case and Multi-Case will use the same PDF for each case. This feature can expedite case administration for attorneys, trustees and court users.

Batch Filings (See **STEP 9** for the Multi-Case Process.)

Chapter 13 Trustee's Motion to Dismiss Case is a classic example of a pleading used for Batch processing. This feature allows different case numbers and names as well as standard language to appear on each pleading. Each PDF file, although the same type of entry, can be filed in volume by the Trustee's office (or the court) more efficiently. The following steps illustrate the batch process.

- STEP 1** Click the [Bankruptcy](#) hyperlink on the CM/ECF Main Menu. (See Figure 1.)

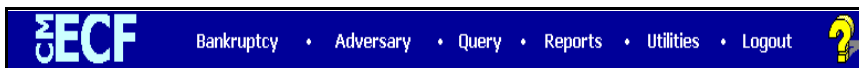


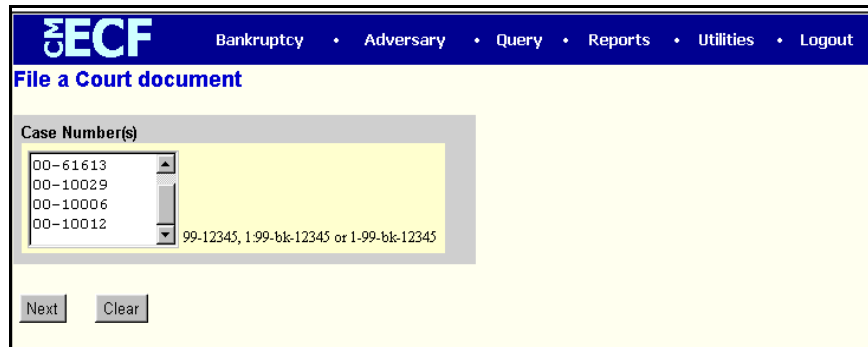
Figure 1

- STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)



Figure 2

- ◆ Select [Batch Filings](#).

STEP 3 The **CASE NUMBER** screen will appear. (See Figure 3.)**Figure 3**

- ◆ Each case number should be typed in this extended window.

NOTE: It is suggested that one type the list of case numbers in WordPerfect (or other word processing program.)

In WordPerfect, highlight the list with your mouse, click on Edit on the browser menu bar and choose Copy (or use the keystroke **[Ctrl] + C**).

Toggle back **[Alt + Tab]** to CM/ECF and position the cursor within the Case Number box. Click on Edit on the menu bar and choose Paste (or use the keystroke **[Ctrl + V]**.)

If any of the case numbers are invalid, an error message appears and the valid case numbers already entered will be lost. If that happens, one can easily go back to the WordPerfect list **[Alt + Tab]** and make the change(s) in the list without having to type in all the case numbers again.

- ◆ After successfully entering all of the target case numbers, click **[Next]**.

STEP 4 The **DOCUMENT SELECTION** screen is presented next. (See Figure 4.)

Figure 4

- ◆ Each case number and title will appear above the document window as a hyperlink to the docket report. This is an opportunity to verify the case before proceeding.
- ◆ Select the type of document to file from the list and click **[Next]**.

STEP 5 The **PDF DOCUMENT ASSOCIATION** screen displays with a Browse window for each of the target cases. (See Figure 5.)

Figure 5

- ◆ For each case, click **[Browse]**, then navigate to the directory where the PDF file for this filing is located or type the file path in the text box.

- For quality control purposes it is recommended that each file be opened to verify its contents before proceeding:
 - Highlight the PDF file with a right click of your mouse.
 - Select Open to bring up the document for viewing and verification. Close the file and select it, if correct.
- ◆ Continue with each file in the list.
- ◆ Click **[Next]** to continue.

STEP 6 The **MODIFY DOCKET TEXT** screen displays. (See Figure 6.)

- ◆ Complete the docket text with the appropriate descriptive detail.

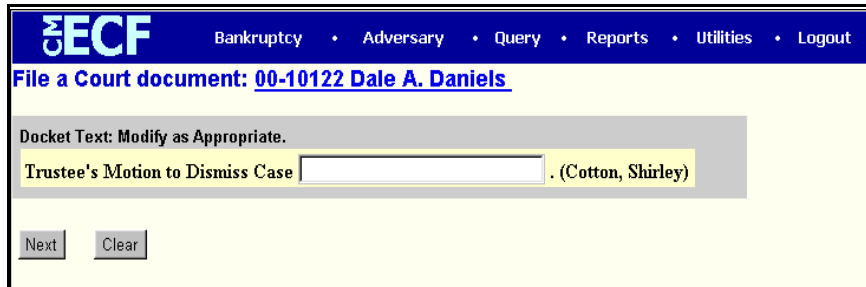
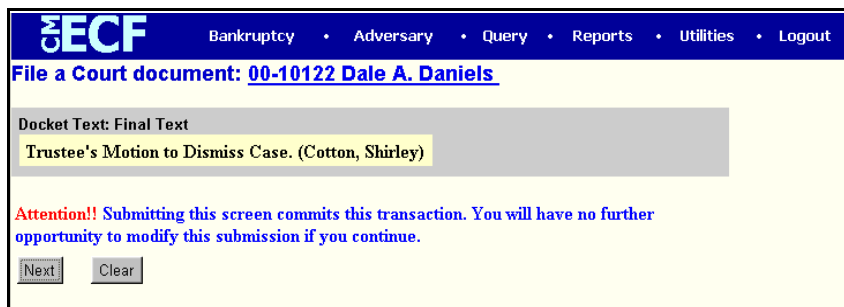


Figure 6

- ◆ Click **[Next]**.

NOTE: Any modifications to the docket text will apply to **all** cases included in this filing.

STEP 7 The **DOCKET TEXT** window is presented next. (See Figure 7.)



The screenshot shows the CM/ECF web interface. At the top is a blue navigation bar with the CM/ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar is a yellow header area with the text 'File a Court document: 00-10122 Dale A. Daniels'. The main content area has a grey background and contains the text 'Docket Text: Final Text' followed by a text box containing 'Trustee's Motion to Dismiss Case. (Cotton, Shirley)'. Below the text box is a red warning message: 'Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.' At the bottom of the form are two buttons: 'Next' and 'Clear'.

Figure 7

- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet.
- ◆ If the docket text has a significant error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen that caused the error, and correct it.
- ◆ To abort or restart the transaction, click on the Bankruptcy Events hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ If the docket text is correct, click **[Next]** to continue.

STEP 8

One **NOTICE OF ELECTRONIC FILING** will be generated for all the cases in this transaction. (See Figures 8a and 8b.)



 Bankruptcy • Adversary • Query • Reports • Utilities • Logout 	
File a Court document: 00-01214 Benjamin's Tacos 00-61613 Milo Milanovich 00-10029 Sam Redwood and Alphonsus M. Capone 00-10006 Amalgamated Products 00-10012 Interactive Media, Inc.	
Notice of Electronic Filing The following transaction was received from Stevens, Kate on 3/5/2001 at 5:21 PM CST	
Case Name: Benjamin's Tacos Case Number: 00-01214 Document Number: 7	Case Name: Milo Milanovich Case Number: 00-61613 Document Number: 27
Case Name: Sam Redwood and Alphonsus M. Capone Case Number: 00-10029 Document Number: 23	
Case Name: Amalgamated Products Case Number: 00-10006 Document Number: 8	
Case Name: Interactive Media, Inc. Case Number: 00-10012 Document Number: 10	
Docket Text: Trustee's Motion to Dismiss Case. (Stevens, Kate) The following document(s) are associated with this transaction:	
Charles Brent Massey cbmassey@somewhere.com 00-61613 Notice will not be electronically mailed to: Perry Mason Mason & Associates 217 Woodlawn Houston, TX 77229 Katita Stevens , Katita Stevens Laurel, Chaplin & Hardy 4410 E. 57th Street Chicago, IL 60601	
Case Number: 0-10029 Document description: Original filename: R:\TRAINING\ECF\Docs_PDF\ECFdocs\Motion.PDF Electronic document Stamp: [STAMP bkecfStamp_ID=981492479 [Date=3/5/2001] [FileNumber=7770-0] [Of c6b588cc8811d51ff3cc9e447bf13aead2c380ef4864fb1a740d76b48689d7eae031f5483a3902df4d5d631e69869f28adf7d00af9daa2d0b373f308c7afe]]	
Case Number: 0-10006 Document description: Original filename: R:\TRAINING\ECF\Docs_PDF\ECFdocs\Motion.PDF Electronic document Stamp:	

Figure 8a

[STAMP bkecfStamp_ID=981492479 [Date=3/5/2001] [FileNumber=7771-0] [c4de351af4e5b543c201398c9d7ae37367e1c74b1b42ab5e408d8022a51241d1d7a09b71d5338cb32341ad80bc653c1e0a3471d9d3e97299d2bb9ea26c48ee2e]]

Case Number: 0-10012

Document description:

Original filename:R:/TRAINING/ECF/Docs_PDF/ECFdocs/jointmotion.PDF

Electronic document Stamp:

[STAMP bkecfStamp_ID=981492479 [Date=3/5/2001] [FileNumber=7772-0] [74f75d6b9220b46c62be72d4b36f05f7950a9647f28f3ca3d71ed28744cbcc70c369c4ef83d66d9e3430246d7bfa2153271cc09db6be6d9b503b6add8c5627b]]

00-01214 Notice will be electronically mailed to:

00-01214 Notice will not be electronically mailed to:

00-61613 Notice will be electronically mailed to:

Case Number: 0-1214

Document description:

Original filename:R:/TRAINING/ECF/Docs_PDF/ECFdocs/Motion.PDF

Electronic document Stamp:

[STAMP bkecfStamp_ID=981492479 [Date=3/5/2001] [FileNumber=7768-0] [1f4e90f0a4a641ce30ef77d9b7b9b81abcf4d777d5d2a7022fcc092df129692947ccdcda dda5ed75ecd028b7137ad672d4d115692265eeafafde8149c83ed773]]

Case Number: 0-61613

Document description:

Original filename:R:/TRAINING/ECF/Docs_PDF/ECFdocs/jointmotion.PDF

Electronic document Stamp:

[STAMP bkecfStamp_ID=981492479 [Date=3/5/2001] [FileNumber=7769-0] [0dcb08291c68b7c726375f47c6d174851fd4b07a1612cc5a13ba0b6b2243aea480bc0985ee067e70601051a043a00f3b89fd9c8d66bda484c405e127551c8c77]]

Donita Thompson
1211 Maple Valley
Suite 200
San Antonio, TX 78244

00-10029 Notice will be electronically mailed to:

Julian Mayfair mayfair@email.msm.com, stvensk@aottd.uscourts.gov

00-10029 Notice will not be electronically mailed to:

Edward Hensley

,

Dana L. Wilson

,

00-10006 Notice will be electronically mailed to:

00-10006 Notice will be electronically mailed to:

00-10006 Notice will not be electronically mailed to:

00-10012 Notice will be electronically mailed to:

Julian Mayfair stvensk@aottd.uscourts.gov, stvensk@aottd.uscourts.gov

00-10012 Notice will not be electronically mailed to:

Trustee Gloria

Figure 8b

- ◆ All case data will be combined on this one Notice of Electronic Filing. All case numbers, title and document numbers will be grouped together. The electronic document stamp and document description will be listed for each case. And finally, the electronic mailing information for parties on each case will be listed by case. **(See Figure 8b.)**
- ◆ It is suggested that this notice be printed or saved to a file in a common directory on the network.

Multi-Case Filings

To expedite and streamline the exact same entry to multiple cases the **Multi-Case** function was created.

This type of filing must contain standard “boiler plate” language which would apply to every case included in the process because the document and docket text will be identical in each case. The filer option could be used to identify each trustee by name if not already included in the docket text.

STEP 9 The **Multi-Case** category is a separate selection on the **BANKRUPTCY EVENTS** screen. (See Figure 9.)



Figure 9

- ◆ Select Multi-Case Docketing from the Bankruptcy Events menu.

STEP 10 The **CASE NUMBER** screen appears. (See Figure 10.)

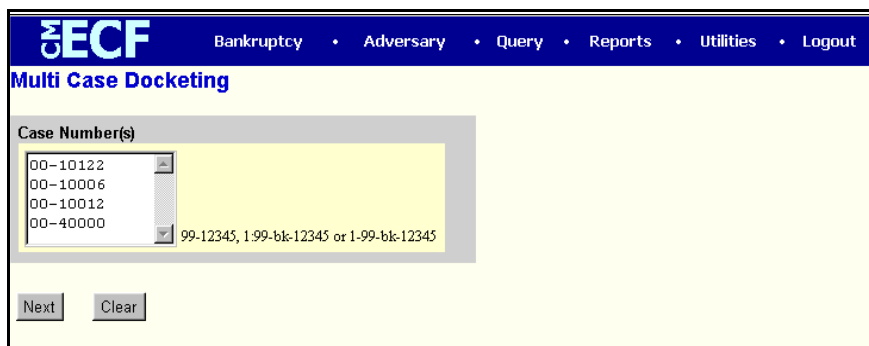


Figure 10

- ◆ Each case number should be typed in this extended window.

NOTE: If this entry will be filed in many cases, it is suggested that one type the list of case numbers in WordPerfect or other word processing program first.

In WordPerfect, highlight the list with your mouse, click on Edit on the browser menu bar and choose Copy (or use the keystroke **[Ctrl] + C**).

Toggle back **[Alt + Tab]** to CM/ECF and position the cursor within the Case Number box. Click on Edit on the menu bar and choose Paste (or use the keystroke **[Ctrl + V]**.)

If any of the case numbers are erroneous an error message appears and the valid case numbers already entered will be lost. If that happens, one can easily go back to the WordPerfect list **[Alt + Tab]** and make the change(s) in the list without having to type in all the case numbers individually again.

- ◆ After entering all of the target case numbers, click **[Next]**.

STEP 11 The **DOCUMENT SELECTION** screen is presented next.
(See Figure 11.)

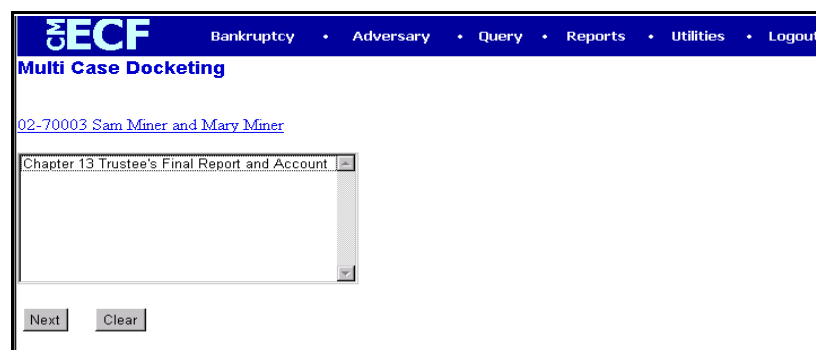


Figure 11

- ◆ Each case number and title will appear above the document window as a hyperlink to the docket report. This is an opportunity to verify each case before proceeding.
- ◆ Select the Type of document to file from the list and click **[Next]**.

STEP 12 The **PDF DOCUMENT SELECTION** screen appears.
(See Figure 12.)

Figure 12

- ◆ The file date and the EOD date as well as the document number for each case will appear in a subsequent screen, the **Notice of Electronic Filing**.
- ◆ To link a PDF file:
 - Click **[Browse]**, then navigate to the directory where the PDF file is located or type in the entire drive and directory path.
 - Click the PDF file to select it. ALWAYS right click to open the file and verify that this is the correct PDF document to associate with this filing.
 - Click **[Next]**.

STEP 13 The **MODIFY DOCKET TEXT** screen displays. (See Figure 13.)

Figure 13

- ◆ Use the text box to further annotate the final text.

NOTE: Any modifications to the docket text will apply to **all** cases included in this filing.

- ◆ Click **[Next]** to continue

STEP 14 The **FINAL DOCKET TEXT** window is presented next.
(See Figure 14.)



The screenshot shows a web browser window with the CM/ECF logo and a navigation menu (Bankruptcy, Adversary, Query, Reports, Utilities, Logout). The title bar reads "Multi Case Docketing : 02-70003 Sam Miner and Mary Miner". The main content area has a header "Docket Text: Final Text" and a text box containing "Chapter 13 Trustee Final Report and Account. (Miller, Debra)". Below the text box is a red warning message: "Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue." At the bottom are two buttons: "Next" and "Clear".

Figure 14

- ◆ To modify a previous screen click on the browser **[Back]** button to find the screen to correct the error.
- ◆ To abort this transaction, (at any time up until this last screen) click on *any* of the hyperlink menu selections on the CM/ECF main menu bar. This will prevent this filing from being sent to the court's database.
- ◆ If the final text is correct, click **[Next]** submit these entries to the database. The next sequential document number will be assigned in each respective case.

- STEP 15** One **NOTICE OF ELECTRONIC FILING** will be generated for all the cases in this transaction. (See Figure 15a.)



Figure 15a

- ◆ All case data will be combined on this one Notice of Electronic Filing. All case numbers, title and document numbers will be grouped together. If a PDF document is used, the **same** electronic document stamp and document description will be listed for each case. And finally, the electronic mailing information for parties on each case will be listed by case. (See Figure 15b.)
- ◆ It is suggested that this notice be printed or saved to a file in a common directory on the network.